STANDARD OPERATING PROCEDURE

Field Service Call SOP

Document no.	SOP-FSV-001
Revision	1.0
Owner	Service Operations Manager
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Review cycle	Every 12 months

1. Purpose

To make sure every field service call is triaged, dispatched, diagnosed and repaired consistently and safely, so customers are kept informed, repairs are verified before the technician leaves, and equipment history stays accurate for future visits.

2. Scope

Applies to onsite service calls performed by field technicians for existing customers with installed equipment. Installation projects, depot repairs and warranty return processing are covered by separate procedures.

Definitions

Work order	The record created for a service call that captures the customer, equipment, reported issue and work performed.
SLA	Service level agreement. The response and repair time a customer is entitled to under their service contract.
First-time fix	A repair that resolves the customer's reported issue on the first visit, with no return trip needed for the same fault.
Van stock	The parts, tools and consumables a technician carries in their service vehicle to complete common repairs without a parts run.

3. Responsibilities

Field Service Technician	Travels to customer sites to diagnose and repair equipment, follows safety procedures, and documents work performed.
Dispatcher	Logs service requests, assigns technicians based on skill and location, and communicates ETAs and status updates to customers.
Service Manager	Approves warranty claims and high-cost repairs, reviews closed work orders for quality, and handles escalations.
Customer Contact	Describes the equipment issue, provides site access, and reviews and signs off on completed work.

RACI matrix

Activity	Field Service Technician	Dispatcher	Service Manager	Customer Contact
Log and triage the service request	I	R/A	C	C

Activity	Field Service Technician	Dispatcher	Service Manager	Customer Contact
Dispatch technician and set ETA	C	R/A	I	I
Diagnose and repair equipment onsite	R/A	I	C	I
Approve repair cost or warranty claim	R	I	A	I
Close out and invoice the work order	R	R	A	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Field service management app or work order system
- Diagnostic tools such as a multimeter, pressure gauges or a laptop with diagnostic software
- Van stock parts inventory
- Manufacturer service manuals
- Customer equipment service history
- Work order and invoice forms

Personal protective equipment

- Safety glasses
- Insulated gloves for electrical work
- Steel-toe boots
- Hearing protection where required

5. Procedure

Step	Task	Owner	Done
5.1	**Log the service request** Dispatcher logs the customer, equipment, reported issue and priority level in the field service system as soon as the call comes in.	Dispatcher	☐
5.2	**Triage and assign priority** Dispatcher checks the customer's SLA tier and equipment warranty or contract status, and classifies the call as emergency, same-day or scheduled.	Dispatcher	☐
5.3	**Dispatch technician and confirm ETA** Dispatcher assigns the closest qualified technician, sends the work order and equipment history to their mobile device, and communicates the arrival window to the customer. **Checkpoint:** The technician has the equipment's service history before leaving for the site.	Dispatcher	☐
5.4	**Prepare before departure** Technician reviews the reported symptoms and service history, and pulls the parts most likely needed from van stock based on the fault type.	Field Service Technician	☐

Step	Task	Owner	Done
5.5	**Arrive and check in with customer** Technician arrives within the SLA window, checks in with the customer contact, and confirms the equipment and reported problem before touching anything. **Checkpoint:** The reported symptoms are confirmed with the customer before work begins.	Field Service Technician	☐
5.6	**Perform a site safety walk** Technician assesses site hazards such as live electrical panels, confined spaces or moving machinery, and puts on the required PPE before opening any panel or enclosure. **Warning:** Do not open an electrical panel or enclosure without confirming the power is isolated and verifying zero energy first.	Field Service Technician	☐
5.7	**Diagnose the fault** Technician tests the equipment with a multimeter or other diagnostic tools, compares readings to the manufacturer's specifications, and records findings on the work order.	Field Service Technician	☐
5.8	**Get approval for the repair cost** If the repair cost is above the technician's authorized limit, or the fault may be covered by warranty, the technician explains the findings and cost to the customer or contacts the service manager for approval before proceeding. **Checkpoint:** Any repair above the authorized cost limit is approved by the customer or service manager before parts are used.	Field Service Technician	☐
5.9	**Perform the repair** Technician repairs or replaces the faulty component per the manufacturer's instructions, using van stock or an ordered part if the correct one is not on hand.	Field Service Technician	☐
5.10	**Test and verify the fix** Technician runs the equipment through a full operating cycle to confirm the reported fault is resolved and checks for any related issues before considering the job done. **Checkpoint:** The equipment completes a full operating cycle without repeating the fault before the call is marked complete.	Field Service Technician	☐
5.11	**Clean up and restore the site** Technician removes packaging and old parts, wipes down surfaces touched during the repair, and returns the work area to its original condition.	Field Service Technician	☐
5.12	**Review findings and get customer sign-off** Technician explains the work performed, parts replaced and any recommendations to the customer contact, then has them sign the work order in the mobile app or on paper.	Customer Contact	☐
5.13	**Close out the work order** Technician submits parts used, labor time and photos in the field service system, and the service manager reviews the closed call for invoicing and quality.	Service Manager	☐

6. Quality checks

- Service manager audits a sample of closed work orders each week for completeness and accuracy.
- First-time fix rate is tracked by technician and by equipment type.
- Every closed call has a customer signature or a documented reason why one was not obtained.

- Parts used on the call are reconciled against van stock within the same week.

7. Records

- Signed work order in the field service system
- Equipment service history log
- Parts usage and van stock reconciliation log
- Customer satisfaction survey responses

8. KPIs

- First-time fix rate
- Average response time against the SLA
- Mean time to repair
- Customer satisfaction score

9. Common mistakes

- Leaving the site without a customer signature on the work order.
- Skipping the site safety walk because the technician has visited before.
- Not updating the equipment history, so the next technician repeats the same diagnostics.
- Using a non-approved substitute part without service manager approval.
- Under-reporting travel or labor time in the field service system.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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